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RB

RESTAURANT BUSINESS

Style Statements

BUSINESS BAROMETER

Business Travel Expenditures Soar

(Average Weekly Costs)

	1979	1989	% increase
Meals	$118.75	$178.35	50.2
Lodging	157.25	489.05	110.0
Auto Rental	203.50	216.25	6.2

Source: Sales & Marketing Management

Lodging and meal expenses for business travelers soared over the last 10 years while car rental costs remained relatively stable, according to a business costs survey by *Sales & Marketing Management* magazine. Average weekly expenses for meals jumped 50.2% while outlays for lodging leaped 110%. In contrast, auto rental expenses increased modestly.

Medium Salaries For Foodservice Professionals

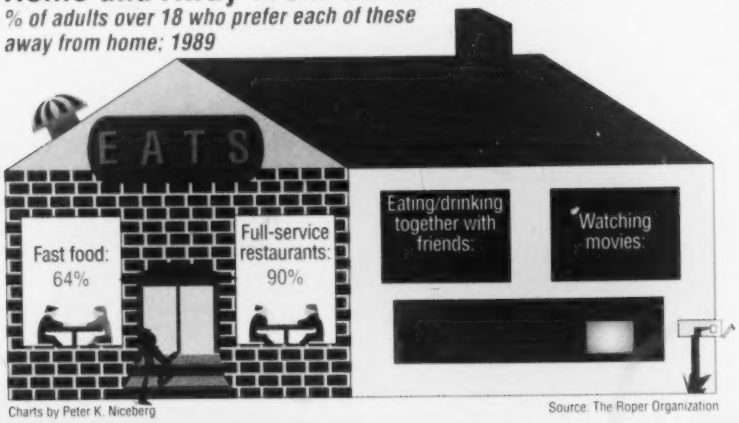
Source: Roth Young

	1990
Chief Operating Officer	$220,000
Operations Director (chain)	85,000
District Manager (multi-unit)	61,000
General Manager (fast food)	35,000
General Manager (restaurant)	51,000
Chef	47,000
Cook	21,000
Food & Beverage Director (hotel)	62,000

Raises for employees in the foodservice/hospitality industries will be nearly double the national average this year, according to the annual Roth Young Wage & Salary Review. While the average American's income will rise 2.28% in 1990, the average salary for foodservice employees will climb 4.5%.

Home and Away-From-Home Preferences

% of adults over 18 who prefer each of these away from home: 1989



Charts by Peter K. Niceberg

Source: The Roper Organization

Americans prefer the comforts of home when it comes to watching movies and eating together with friends, but when it comes to eating restaurant food at home or in restaurants, they clearly prefer the latter. Consumers were particularly inclined to consume meals in full-service restaurants rather than at home.

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COVER STORY

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Cover photograph by Steven Brooke

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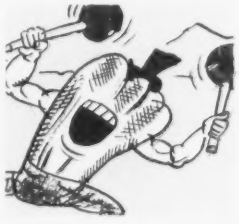

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IN THE NEXT ISSUE

COVER STORY TOP 50 GROWTH CHAINS
Once again, with the help of Chicago-based consulting firm Technomic Inc., *RB* offers its exclusive report on the 50 fastest-growing second-tier chains. These low-profile performers are ranked in terms of sales and unit growth. Report will include a profile of this year's number-one growth chain, Applebee's Neighborhood Grill & Bar, which had 87.5% sales growth from 1988 to 1989.

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Salad bars, chicken, and seafood are now as common as sirloins in steak houses. The shift has occurred as steak-house operators compete in the midprice market.

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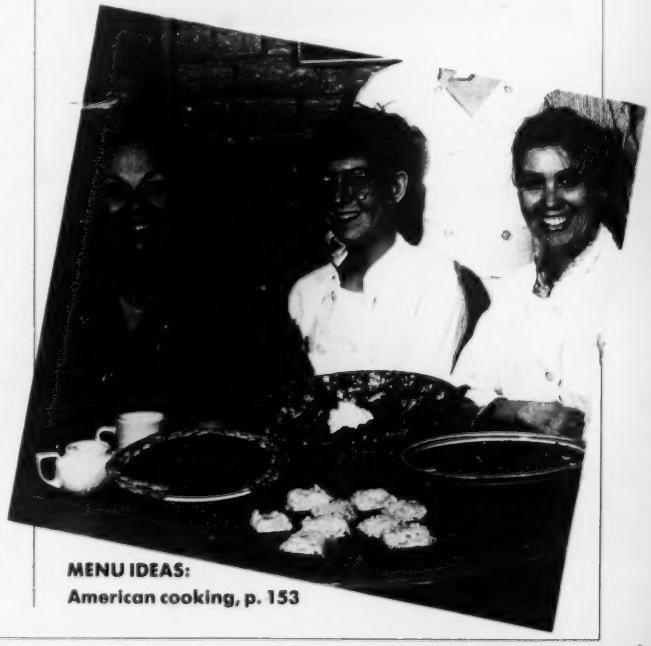
Premium brand cocktails provide some excitement for operators in a generally flat market.



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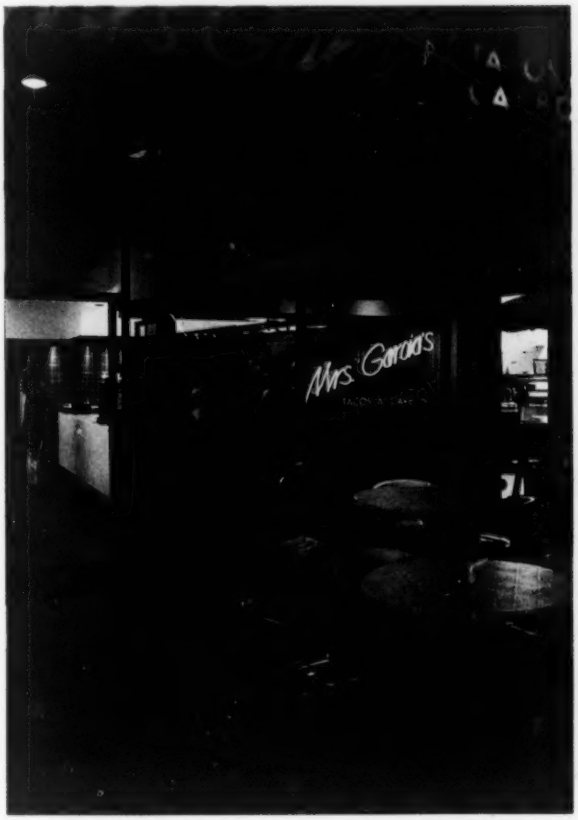
MARKET SEGMENT REPORT

DRIVE-THRU & DELIVERY

by Carol Casper

Diners today are looking for speed and convenience—and for many consumers, that means take-out. Off-premise dining, measured in traffic counts, grew 3% from 1988 to 1989, compared to a negligible gain of 0.2% in on-premise sales. George Rice, spokesman for CREST, a service of NPD Group, Park Ridge, IL, which supplied these statistics, notes that take-out continues to be the dominant force driving foodservice industry growth, as it has been for the last five years.



In Los Angeles, Mrs. Garcia's 12 units are located in 1,000-sq.-ft. strip mall sites that encourage carry-out.

And, while carry-out visits were up by 2.3% in 1989 over 1988, drive-thru traffic increased 3.2%, and delivery volume 8.1%. Comparing each category's slice of the pie, the two most convenient take-out services, drive-thru and delivery, have increased their shares of overall take-out volume compared to two years ago, while carry-out shrank from 64% to 60.4% of take-out traffic.

ON THEIR WAY. Denny Robertson, president of Fishy Things Inc., which operates Dock's Restaurants, a Willowbrook, IL-based chain that is shifting some of its carry-out business to drive-thru service, notes, "A lot of folks don't even want to take the time to come into the restaurant."

Off-premise dining traffic grew 3% from 1988 to 1989.

For speed alone, probably no other kind of operation can match the records being set by the double-drive-thru chains. Primarily oriented toward hamburgers but now offering a slightly wider array of fast-food items, this genre is probably most familiar through five-year-old pioneer Rally's, based in Louisville, KY. However, a number of other companies have jumped on the bandwagon, and though smaller and more locally based, several are aiming for significant expansion.

One is Zipps Drive-Thru, St. Louis, which opened its first store in May 1987. Zipps now has 32 locations, 20 company-owned and the rest franchised, notes vice president of operations Jack Mertens. The company plans to add eight to 10 more franchisees this year and have nearly 50 restaurants open by December, with a total of 90 to 100 units targeted for the end of 1991. Franchises are in Illinois, Arizona, North Carolina, Florida, and Kansas.

Zipps' average store measures just 650 to 700 sq. ft.

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DRIVE-THRU & DELIVERY

and features a limited menu of hamburgers, cheeseburgers, chili, one size of fries and soft drinks, plus a new chicken sandwich. The average check is $3.50 and average service time is just 30 to 40 seconds.

Another recent entry in the drive-thru derby is based in nearby Alton, IL, a St. Louis suburb. Dubbles Drive-Thru Restaurants, which debuted in January 1988, has 15 units in Ohio, Illinois, and Missouri, and plans to open 19 more by the end of the year. Dubbles' standard unit is a self-contained, prefabricated building measuring 14 ft. by 40 ft., delivered to each site with all equipment installed.

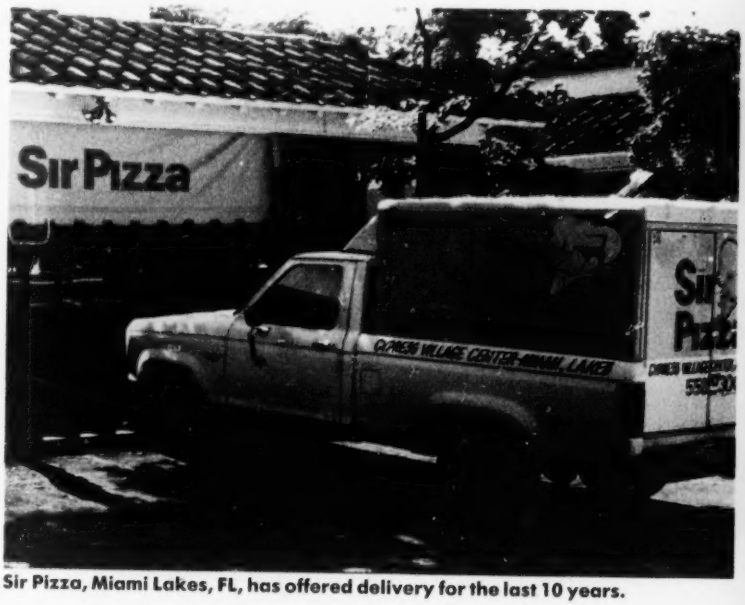
The chain, all franchised except for one unit, also includes several walk-up operations in amusement parks. Most expansion, however, will be in drive-thrus, notes Ford Phillips, director of advertising and public relations.

Dubbles offers a slightly larger menu than Zipps, including fish sandwiches and corn dog nuggets as well as several burger varieties and a chicken sandwich. It also accents low prices. A quarter-pound hamburger with everything on it is 99¢. Checks average $3.15, and annual unit sales average $780,000.

Both Zipps and Dubbles, like other drive-thrus, also offer walk-up windows, and have some outdoor seating on most lots. However, walk-up accounts for only a tiny portion of sales at most units. One beauty of double drive-thrus for operators is the low labor involved. At a Dubbles unit, for example, staff consists of two grill workers, one fry cook, one drink-filler, and a bagger.

NOSTALGIA. Another approach to drive-up dining is embodied by Sonic Industries Inc., Oklahoma City, OK, an original '50s carhop chain that has found a new image in the '80s. Although nostalgia may help bring customers in, says Sonic president and CEO C. Stephen Lynn, what keeps them coming back are the food and service.

"We cook all our foods to order, and with 24 order stations at each unit, we can take orders and fill them faster than a drive-thru hamburger chain," he adds. "Our average service time is under four minutes."



Sir Pizza, Miami Lakes, FL, has offered delivery for the last 10 years.

People don't want to eat out every day, but they aren't oriented to cooking at home.

Although the original drive-in concept was for people to eat in their cars at the order stations, today about 50% to 60% of Sonic's customers actually use the stalls as drive-thru points. Sonic is experimenting with regular drive-thru windows in its new units, not to provide faster service, but "because most customers in markets unfamiliar with Sonic have a bias for them," says Lynn.

Sonic currently operates over 1,000 units, mainly franchised, in 21 states across the southern half of the country. It expects to add 85 more restaurants this year and another 85 to 100 in 1991.

The menu is similar to most other eat-in and drive-thru hamburger chains, with a few additions. They include hot dogs with toppings, corn dogs, fish and steak sandwiches, onion rings cut fresh daily, and two to three specials determined by each operator.

Per-person checks average $2.24 and unit sales run over $400,000, up 51% since 1983. Lynn adds that the company wants to be the number-two hamburger chain in the South within five years.

NEW APPROACH. Another chain that started as a drive-in in the '50s has switched its take-out approach to drive-thru. Runza Drive-Inns of America, Lincoln, NE, recently changed its name to Runza Restaurants since it discontinued the drive-in format in 1983. Today, all of the company's nearly 50 units feature drive-up service, except for 10 food court sites. Runza's regular restaurants also feature on-premise dining; however, take-out orders com-

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DRIVE-THRU & DELIVERY

prise 55% of total sales, and of that portion, nearly two-thirds is drive-thru.

The company's signature Runza sandwich is a handy take-away food—a mixture of fresh ground beef, cabbage, onions, and spices baked inside an oblong loaf of homemade bread. Cheese and Italian versions are also available. The restaurants also offer hamburgers, fish sandwiches, and three kinds of grilled chicken sandwiches, plus other signatures such as special soups and salads and fresh homemade onion rings.

Runza is just one example of a tremendous trend today—the extension of take-out service to an ever wider variety of operations and menu choices.

One unusual concept is The Spaghetti Shop, a 31-unit, Champaign, IL-based chain that opened its first store in 1985, specializing in pasta.

About 48% of sales are take-out, says president Jim Teaters, largely half-gallon buckets of the Shops' main menu items, which include spaghetti with meat sauce, marinara, and primavera, plus fettuccine Alfredo, and ravioli. The buckets, which weigh approximately 4 lb., can feed a family of four at prices ranging from $7.50 to $8.25, including a loaf of garlic bread. They account for 36% of total volume.

In addition to buckets, single servings, complete dinners, and à la carte selections are also available for take-out. Other items include a chef salad, lasagna, pasta salad, and dinner salad, packaged for four to go.

The Spaghetti Shop recently introduced drive-up in five units, and based on its success, several other units are now being retrofitted. At sites with windows, drive-thru accounts for 65% of take-out sales, Teaters notes.

FAST SEAFOOD. Another chain with a difference is Dock's, specializing in hand-breaded fish and shrimp. The company operates 20 restaurants in Chicago and two in Philadelphia, including nine franchised units, and should have additional single units opening in Nashville, Detroit, Cleveland, Milwaukee, St. Louis and Minneapolis by September, Robertson notes.

SHARE OF THE TAKE-OUT PIE

(Increase of usage 1988-1989)

SOURCE: CREST, a service of NPD Group

STEVE HULL

Dock's added its first drive-thru in 1987 and now has them at about half its stores. Units with drive-thrus average 25% to 50% higher sales.

Dock's menu includes a signature fish sandwich consisting of two fillets on a whole wheat bun for $2.99, fish by the piece, a farm-raised catfish dinner, and three sizes and varieties of shrimp, including a "Sassy" Cajun style, which are sold by the pound and half-pound. It also offers chicken wings for non-seafood eaters. Average unit volumes range from $400,000 to $1.3 million.

PoFolks Inc., Nashville, is now testing drive-thru windows at several of its 135 units, and early results have been "spectacular," reports president John Scott. This chain does an average of 8% to 10% of sales in take-out systemwide, but at the test units, drive-thru accounts for as much as 30% of store volume, or about a 10% to 20% incremental sales gain, Scott notes. About 60% of PoFolks' take-out sales come from its 16-piece "Blue Ribbon Chicken Piknik" ($15.99) which includes enough chicken and fixin's to feed six.

Delivery has been grabbing a much larger share of the take-out pie.

Another concept that will be adding some drive-thrus is Wyatt Cafeterias, Dallas. "The cafeteria is the original fast-food operator, and we've always made food available to go," says president George DeShazo. Two years ago, the company began building cafeterias with separate facilities for take-out. Wyatt is now developing a drive-thru, which will probably incorporate an easy-to-change menu board so the units can alter selections daily.

Based in Lincoln, NE, Amigos is a Mexican chain that is exploring different take-away avenues. The eat-in operation occupies a niche between fast food and full-service, notes vice president of marketing Joe Field. Customers order at a counter but are served at the table, on real china.

All of the chain's units, except for food court sites, also offer drive-thru. Field estimates 20% of volume is from take-out, mostly drive-thru. Close to 60% of customers use the drive-thru sometimes, he adds, and 15% use it exclusively. Another approach, currently in test at two units, is a self-serve deli case featuring selected menu items.

MEXICAN ON THE MOVE. Another Mexican chain that will probably experiment with drive-thru as it continues to expand is Los Angeles' Mrs. Garcia's. Currently, most of this "healthy Mexican" chain's 12 units are located in 1,000-sq.-ft. strip mall sites that offer in-store counter dining but are de-

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signed to encourage take-out. The firm did, however, recently open its first freestanding unit, and co-owner Geri Warner says the chain may add drive-thrus in outlying areas.

Mrs. Garcia's menu is built around soft tacos featuring chargrilled steak, marinated boneless, skinless chicken breasts, and shrimp, chopped up hot off the grill and served in warmed soft tortillas. Also featured are vegetarian items, a variety of tostadas and quesadillas, salads, fajitas, and snacks.

To build take-away business, which currently accounts for about 40% of sales, the chain recently introduced a Fiesta Pack which allows customers to order main dishes by the pint, along with beans, rice, salads, and dressings.

In New York City, Dosanko Foods Inc., which operates nine Japanese-style noodle shops, is also experimenting with fax orders and delivery. Dosanko's sites have average volumes that range from $500,000 to $1.2 million. About 15% to 20% of sales is from take-out, but that is growing. Most take-out business is during lunch, general manager Kazuhiko Sato notes.

DELI DOINGS. That you don't have to be big to get into fax and delivery is demonstrated by Dot's Deli, a tiny breakfast and lunch operation in Natick, MA. In fact, owner Mike Zimmerman made delivery service a major thrust of his business because his deli seats only 15 and parking is a problem. Dot's does over 50% of sales in deliveries to nearby businesses and nearly another 30% in take-out trade. Zimmerman added a fax machine this spring to get sales from local businesses.

The fax machine was added to eliminate the need for one employee to stay on the phone taking orders during the busy lunch rush.

"I got it mainly to make things easier on us, but I hope it will also increase sales as more local businesses realize they can fax us orders. It's also helped reduce mix-ups on orders," he notes.

Another operation that offers delivery and fax service on a bigger scale is Souper Salad of Boston. This growing chain operates four full-service restaurants and four Souper Salad Express units geared to take-out, plus a new location in Newton, MA, that functions as an Express unit during the day and a full-service restaurant at night.

At Dubbles, a clock times each car's order; average transaction is 45 to 60 seconds.

One feature that differentiates Souper Salad from many of its fast-service competitors is its strong orientation to fresh, homemade and healthy items, notes Larry Reinstein, vice president of operations.

All of the chain's downtown Boston locations offer delivery, he adds, with a $3 service charge and a $20 minimum order. These units and the new Newton location have also recently begun offering fax service. The average delivery ticket probably runs $30 to $40.

Woburn, MA-based MrsMiller'sMuffins also does a large volume with corporations. The company's original three stores did so much corporate take-out and delivery that it recently shifted the bulk of this business to a separate wholesale division, explains founder Elaine Miller.

However, individual stores still do 15% of sales in corporate take-out or catering. This business plus regular walk-in take-out accounts for 90% of breakfast and 70% of lunch volume.

In addition to a variety of traditional muffins and bagels, MrsMiller's features special lunch muffins in varieties like ham and Swiss and chicken, hearty soups and chili, home-made cookies and brownies, frozen yogurt, fresh-squeezed orange juice, and natural so-

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Dubbles' standard unit is a self-contained, prefabricated building.

DRIVE-THRU & DELIVERY

das. Take-out checks average $20.75 due to the high proportion of corporate orders; per-person checks run $2.25.

For home delivery, pizza has always been most popular, largely because it is the one item that has been most widely available. But even in this already well-developed segment, new action has been stirred largely due to Domino's highly visible success.

One chain that recently added delivery directly in response to Domino's competition is Dedham, MA-based Papa Gino's, which operates 220 units in New England and eastern New York state, plus three in Florida. Papa Gino's began testing delivery in September '88 and has since rolled out the service to over 50 units, with new sites coming on line now at a rate of three per week.

"We realized an average 14% increase in sales in stores offering delivery," notes Ron Spinazola, director of marketing, who says eventually most units will add the service except for mall locations that do minimal take-out.

Pizza currently makes up about 95% of deliveries, but this spring the chain began offering other menu items for delivery, such as pasta and sandwiches. Overall take-out, including delivery, averages 40% of system sales, Spinnazola notes; 95% of that is pizza.

Sir Pizza International, Miami Lakes, FL, on the other hand, has offered delivery for the last 10 years, but expects this feature of its business to grow noticeably in the near future. Delivery accounts for about 15% to 20% of store sales and a little more than half of take-out volume, notes Charles Woolweaver, president and CEO.

The fastest-growing segment of its delivery business, he adds, is nonpizza

Woburn, MA-based MrsMiller'sMuffins features sweet and savory muffins.

Packaging food for carryout is a major challenge.

items, which the chain began delivering five years ago. They include pasta, salads and sandwiches, which now make up nearly half of Sir Pizza's delivery business. He adds that the company is working on a drive-thru window.

"There are some problems with that avenue for pizza because of the service time required, but we're developing some approaches that should solve them," claims Woolweaver.

He adds that delivery in general will no doubt grow as a portion of take-out in the near future, due in large part to chains such as Sir Pizza offering a wider variety of menu options.

SPECIAL SERVICES. One major factor in the development of more delivery choices in recent years has been the rise of specialized services in many major cities, which contract with a number of local restaurants to deliver for them for an added fee.

While many of these multirestaurant delivery services concentrate on upscale establishments, Takeout Taxi Inc., Herndon, VA, differs, says president Kevin Abt, because it provides "a Monday night meal solution." Abt has developed a computerized system for marketing home deliveries and licensed the software to operators in about 20 cities. The company plans to start franchising this summer.

In the meantime, Takeout Taxi has also developed its own delivery service in five separate territories covering northern Virginia, starting with four restaurants in 1987 and now representing more than 100.

"Over 40% of our orders are for American-type places featuring ribs, sandwiches, burgers, chicken and

continued on page 128

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READY ACCESS

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A Division of Ready Metal Manufacturing Company
For information circle number 80

steaks," says Abt. "We also represent a large number of ethnic operations including Chinese, Thai, Mexican, and Italian. Pizza accounts for 10% of sales. Prices range from just under $5 to about $10 for most menu items, he adds, and the average delivery ticket runs under $30 for three to four people.

In exchange for its services, the company garners about a 30% discount from the restaurants' menu prices, plus a 15% service charge to customers. It mails 50,000 "super menus" every month and restricts service from each location to within a three-mile radius.

One mistake he feels that other services make is that they think all that is needed is to mail out books of menus.

"They don't understand how marketing-intensive this is," says Abt. "That sort of thing doesn't touch the tip of the iceberg.

"We provide lots of marketing punch because we've developed computerized couponing and marketing systems that work for the restaurants' eat-in business as well as take-out trade. More than just a delivery service, we become a strategic marketing ally," claims Abt.

Yet another approach to home delivery is being offered by Larry Colligan, owner of a Tucson, AZ, landmark restaurant, the Hidden Valley Inn.

He has been testing a concept under the name "Mr. C's Chicken and Ribs—presented by Hidden Valley Inn" for two years, and now hopes to sell the system to a national company or take it nationally himself by licensing established restaurants in other cities.

Colligan's approach is delivering restaurant-type food at a cost below the typical restaurant meal. "Our meals average $6.50 to $6.95 using a menu designed specifically for this service."

Selections currently include barbecued chicken, pork ribs, meat loaf with mashed potatoes and gravy, beef stew, beef and chicken enchiladas, lasagna, a cod dinner, and mesquite-broiled ham.

"Our service and prices are designed so a working parent can afford to order for themselves if they're too tired to cook, or for their kids if they're going out for the evening." **RB**